

Attachment 1

CONTRACT CHECK FORM

(To be completed by the Department)

CONTRACT REQUEST NUMBER (FROM BUYSPEED): _____

ORIGINATING DEPARTMENT: _____

Original and hard copy documentation included. List documents below:

(Law Department Use Only)

_____ Accepted as Complete

_____ Returned to Department for the following reasons:

By: _____
(Name)

(Date)

Note: This form is required to be submitted to the Law Department only if accompanied by original physical documents that are required in order to process a contract request. Examples include an original bid bond form and performance bond form. A hardcopy of this form is generally not required for Contract Requests.

Attachment 2

CONTRACT EXPEDIENCY FORM

(To be completed by the Department)

CONTRACT REQUEST NUMBER (FROM BUYSPEED): _____

ORIGINATING DEPARTMENT: _____

BRIEF DESCRIPTION: _____

Deputy Mayor/ Deputy CAO: _____
Signature

Chief Administrative Officer: _____
Signature

(Law Department Use Only)

_____ Accepted as Complete

_____ Returned to Department for the following reasons:

By: _____
(Name)

(Date)

Note: This form is required to be submitted to the Law Department only if the User Entity is requesting a deviation or exception from the standard routing procedures.

Exhibit 1A : Contract Request Checklist

Professional Services					
Line No.	Required Documents for E Contract Package		Electronic	Hard Copy	Check
1	Microsoft Word Document of the proposed contract or the following content - Brief description of needed services - Detail proposed fee schedule and billing rates - Any special provisions including requirements of the funding source, or contract management tool to be included in the contract - Providing a draft of the contract will facilitate further processing		Y		
2	Advertised RFP Solicitation (Over \$15,000)		Y		
3	Approved Tax Clearance Form	Within 30 days from send for approval on ECMS	Y		
4	Intent to Award Letter from Purchasing (Over \$15,000)		Y		
5	CPO Signed Approval Form		Y		
6	Corporate Resolution		Y		
7	DBE Validation (Over \$15,000)		(If not waived)		
8	DBE Waiver Signed by the CAO (Over \$15,000)		(if applicable)		
9	Signed Selection Committee's Tabulation Form and Recommendation (Over 15,000)		Y		
10	Good Standing Certificate from Secretary of State with Vendor Name Correct or Authority to do Business In Louisiana		Y		
11	Proof of Insurance		Y		
12	Vendor's RFP Proposal (Over \$15,000)		Y		
13	Recommendation Memo (Internal) (Over 15,000)		Y		
14	Conflict of Interest Disclosure Affidavit		Y		
15	Identification of Subcontractors Affidavit		Y		

Note: This form should only be used as guidance regarding the type of requirements needed to process a contract request. Some contracts may require additional forms not included herein.

Exhibit 1B: Contract Request Checklist

Materials, Supplies, Non-Professional Services and Construction					
Line No.	Required Documents for E Contract Package		Electronic	Hard Copy	Check
1	Microsoft Word Document of the proposed contract or the following content - Brief description of needed services -Detail proposed fee schedule and billing rates - Any special provisions including requirements of the funding source, or contract management tool to be included in the contract -Providing a draft of the contract will facilitate further processing		Y		
2	Approved Tax Clearance Form	Within 30 days from send for approval on ECMS	Y		
3	Intend to Award Letter from Purchasing		Y		
4	Advertised Bid Solicitation and Specifications		Y		
5	Bid Bond		Y		
6	Vendor's Bid Proposal		Y		
7	Bid Authorization Form Signed by the CAO		Y		
8	Department Selection Letter		Y		
9	Corporate Resolution		Y		
10	DBE Validation (Over \$15,000)		(If not waived)		
11	DBE Waiver Signed by the CAO (Over \$15,000)		(if applicable)		
12	Good Standing Certificate from Secretary of State with Vendor Name Correct or Authority to do Business in Louisiana		Y		
13	Payment Bond (By Surety Signature) Original Power of Attorney		(if applicable)	(if applicable)	
14	Performance Bond (By Surety Signature) Original		(if applicable)	(if applicable)	
15	Proof of Insurance		Y		
16	Bureau of Purchasing Tabulation Form and Recommendation		Y		
17	Non-Collusion Affidavit		Y		
18	Photocopy of Licenses		Y		
19	Bidder Attestation For Public Works Solicitations		(if applicable)	(if applicable)	

Note: This form should only be used as guidance regarding the type of requirements needed to process a contract request. Some contracts may require additional forms not included herein.

Exhibit 1C: Contract Request Checklist

Amendments					
Line No.	Required Documents for E Contract Package		Electronic	Hard Copy	Check
1	Microsoft Word Document of the proposed contract or the following content - Brief description of needed services -Detail proposed fee schedule and billing rates - Any special provisions including requirements of the funding source, or contract management tool to be included in the contract -Providing a draft of the contract will facilitate further processing		Y		
2	Approved Tax Clearance Form	Within 30 days from send for approval on ECMS	Y		
3	Corporate Resolution		(if applicable)		
4	Copy of Original Contract		Y		
5	Copy of Previous Amendments		Y		

Note: This form should only be used as guidance regarding the type of requirements needed to process a contract request. Some contracts may require additional forms not included herein.

Exhibit 1D: Contract Request Checklist

Grants					
Line No.	Required Documents for E Contract Package		Electronic	Hard Copy	Check
1*	Microsoft Word Document of the proposed contract or the following content - Brief description of needed services -Detail proposed fee schedule and billing rates - Any special provisions including requirements of the funding source, or contract management tool to be included in the contract -Providing a draft of the contract will facilitate further processing		Y		
2	Approved Tax Clearance Form	Within 30 days from send for approval on ECMS	Y		
3	Corporate Resolution		Y		
4	Good Standing Certificate from Secretary of State with Vendor Name Correct or Authority to do Business In Louisiana		Y		
5	Required Funder Contract Material CDBG grant (compliance language)		Y		
6	Selection Materials (if applicable) Sub recipient selection materials		Y		
7	Funding entity contract materials (compliance language)		Y		
8	Selection Materials (Sub recipient Selection Materials)		Y		

*If the City is receiving the grant, only number 1 is needed.

Note: This form should only be used as guidance regarding the type of requirements needed to process a contract request. Some contracts may require additional forms not included herein.

Exhibit 1E : Contract Request Checklist

CEAs					
Line No.	Required Documents for E Contract Package		Electronic	Hard Copy	Check
1	Microsoft Word Document of the proposed contract or the following content - Brief description of needed services -Detail proposed fee schedule and billing rates - Any special provisions including requirements of the funding source, or contract management tool to be included in the contract --Providing a draft of the contract will facilitate further processing		Y		
2	Approved Tax Clearance Form	Within 30 days from send for approval on ECMS	Y		
3	Corporate Resolution		Y		
4	Good Standing Certificate from Secretary of State with Vendor Name Correct or Authority to do Business In Louisiana		Y		

Note: This form should only be used as guidance regarding the type of requirements needed to process a contract request. Some contracts may require additional forms not included herein.

Exhibit 1F: Contract Request Checklist

Real Estate Transactions (Leases, Transfers)					
Line No.	Required Documents for E Contract Package		Electronic	Hard Copy	Check
1*	Microsoft Word Document of the proposed contract or the following content - Brief description of needed services -Detail proposed fee schedule and billing rates - Any special provisions including requirements of the funding source, or contract management tool to be included in the contract --Providing a draft of the contract will facilitate further processing		Y		
2	Approved Tax Clearance Form	Within 30 days from send for approval on ECMS	Y		
3	Corporate Resolution		Y		
4	Good Standing Certificate from Secretary of State with Vendor Name Correct or Authority to do Business In Louisiana		Y		
5	City Council ordinance		(if applicable)		
6	City Planning Commission approval		(if applicable)		
7	Board of City Trusts approval		(if applicable)		
8	Mayoral Delegation of Signatory Authority		(if applicable)		

Note: This form should only be used as guidance regarding the type of requirements needed to process a contract request. Some contracts may require additional forms not included herein.

Exhibit 2

Electronic Contracting Management System process, July 2011

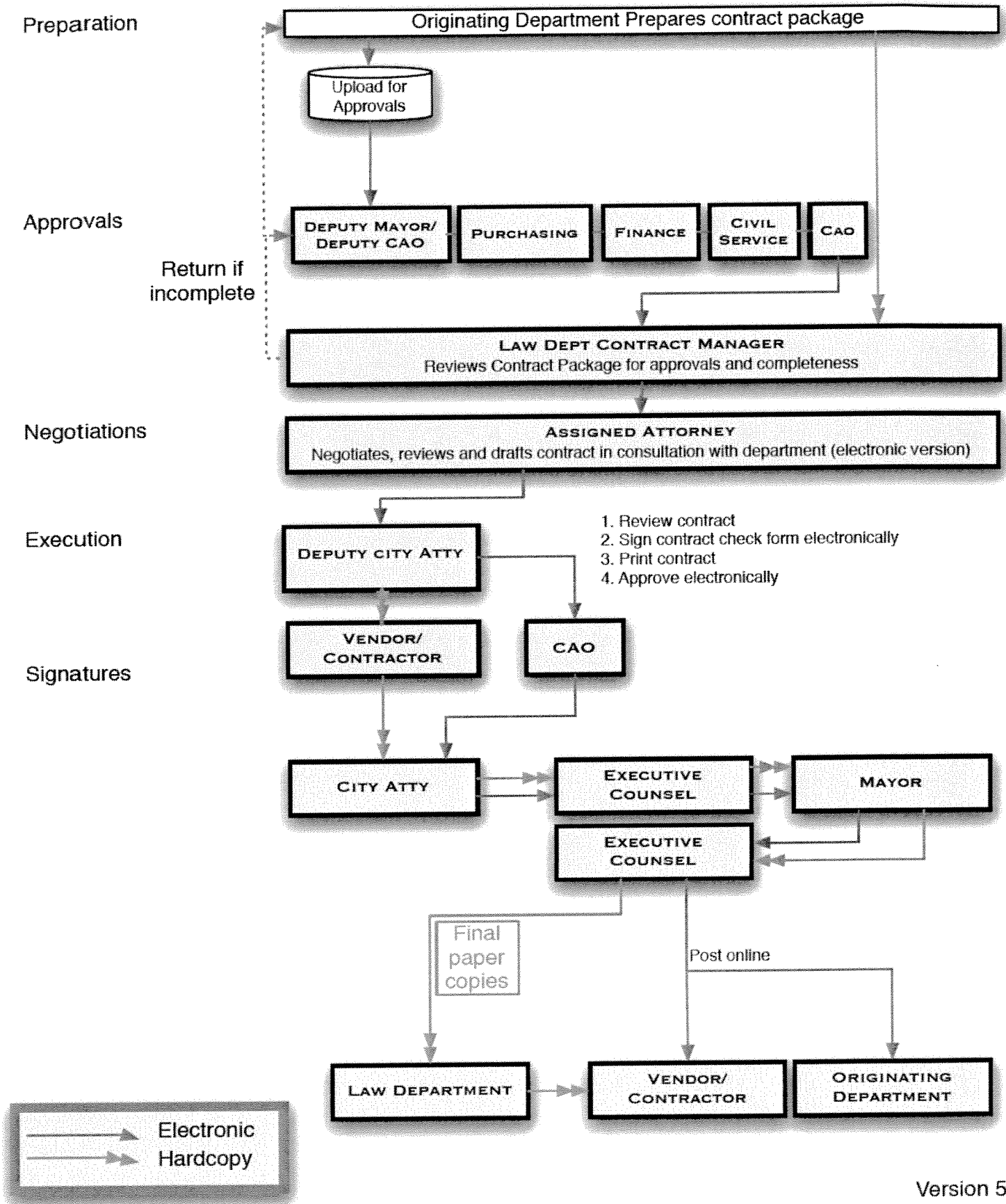


Exhibit 3A: Quick Reference Guide

Creating a Contract Request

This quick reference guide is designed to assist you in understanding how to initiate a Contract for routing. The first phase of Contract initiation includes creating a Request for Contract using BuySpeed's Contract Management module.

Key Terms and Process Overview

Approval in the Electronic Contract Management System (ECMS) BuySpeed module is the means by which identified approvers signify their approval or disapproval of a Request for Contract and a Contract. The ITI Contract Management Administrators establish who can approve, under what circumstances each person approves, and in what order. When a Request for Contract or a Contract is submitted for approval, BuySpeed determines the users that must approve based on the criteria established by the City's current policy, and notifies each approver via email once it is their turn to approve a Request for Contract or a Contract.

In BuySpeed, some of the terminology for Contract routing resembles the procurement terminology. The table describes the BuySpeed terminology and what you'll be approving.

Contract Terminology	BuySpeed Terminology
Request for Contract	Requisition
Assign Contract to an Attorney	Convert to Purchase Order
Approve Contract	Approve Blanket/Contract
Assigned Attorney	Purchaser
Contract	Blanket Purchase Order

A contract request will be created using a **Requisition** document in the BuySpeed Contract Management module. This requisition document will route for approval through your department management and executive management (including Deputy Mayor/Deputy CAO, Purchasing, Finance, Civil Service, and CAO) before routing to the Law Department. In special cases, and with Contracts involving Payment or Performance Bonds, Originating Departments will need to deliver a **Hardcopy Contract Package** to the Law Department including the required original documents the same day as the electronic submission.¹

The requisition will be turned into a contract by creating a **Blanket Purchase Order** by the Law Department. They will then complete the contract document, including negotiations with vendors, and submit for approval and contract execution.

Once the Contract is executed by the Mayor, the Originating Department and the Vendor will be notified via email that the executed Contract is available through an electronic link and that one executed Original is available in the Law Department for the Vendor pick up. Once the contract is executed, it is the Originating Department's responsibility to email the electronic link to the executed Contract to the Bureau of Purchasing. The Bureau of Purchasing is responsible for issuing a **Purchase Order** with encumbrances from the BuySpeed Purchasing Module.

¹ (Note: For all contracts except construction contracts and some grant agreements, the Originating Department must not include copies of the draft contract, nor the Vendor's signature with the Hardcopy Contract Package. In the case of construction contracts, the Originating Department should work with the Assigned Attorney, before beginning the electronic routing process, in order to ensure the contract language is correct and complete. Then the Originating Department should obtain the bonding agent signature, the vendor signature and then submit the package electronically and in hardcopy through the usual process. Originating Departments must also include three (3) original construction contracts signed by the vendor for the purpose of recordation.)

Exhibit 3A: Quick Reference Guide

Creating a Contract Request

Once a Request for a Contract or a Contract is submitted for approval, it enters the “Ready for Approval” status. All packages in this status can be characterized as follows:

- Limited editing capability exists to ensure that the package is not materially changed during the approval process so that an approver isn’t recorded as having approved a document with substantial changes they did not see.
- All triggered approvers must approve in the order specified by Contract Management Administrators before the document can be processed further. No approvers can be skipped.

If any approver disapproves, the package is returned to the Originating Department. If re-submitted for approval, it must travel down the entire approval path that is triggered upon re-submittal.

Navigation

Before you can review and approve a Request for a Contract or a Contract, you must login to BuySpeed. To login to BuySpeed, input your user name into the “Login ID” field and the password you were given by an administrator into the **Password** field. Your user name is the letter “c” for Contracts plus your email address prefix. For example, Jane M. Smith’s user name would be cjmsmith. Next, either click **Enter** on your keyboard or click the **Login** button. Your login ID or password are not case sensitive.

City of New Orleans

Welcome to City of New Orleans

CITY OF NEW ORLEANS

Welcome to the City of New Orleans Purchasing portal page. This portal provides access to vendors to register as a vendor, check for new bid opportunities and login to the system. If you have any questions, please call Purchasing at 504-658-1550 or email Purchasing@cityofno.com.

Register
Register here to begin using City of New Orleans.
Vendors, please read this [disclaimer](#) prior to registering.

Complete Registration
Complete registration here to begin using City of New Orleans.
Vendors, please read this [disclaimer](#) prior to completing registration.

Open Bids
Browse open bid opportunities

Login

Login ID: buyspeed
Password: *****
Login


[Forgot your password?](#)

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If you are a current user of BuySpeed for Purchasing or Accounts Payable, you will need to make sure you log in with your Contracts Management ID and Password. If you are an approver in the Bureau of Purchasing, you

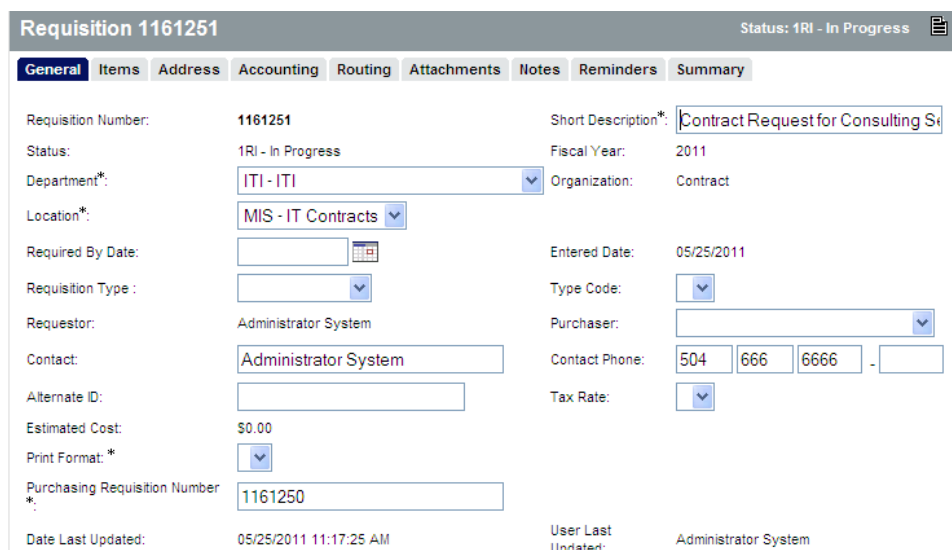
Exhibit 3A: Quick Reference Guide

Creating a Contract Request

can switch between BuySpeed for Purchasing and BuySpeed for Contracts Management by clicking on this icon  at the top of your information bar once you are logged in. Users in the Bureau of Purchasing will need to switch between programs to review the Contract and issue the final Purchase Order.

Creating a Request for Contract Requisition

1. To create a request for contract Requisition, first start a new Requisition by selecting Documents>Requisitions>New.



Requisition 1161251 Status: 1RI - In Progress

General Items Address Accounting Routing Attachments Notes Reminders Summary

Requisition Number: 1161251 Short Description*: Contract Request for Consulting Se

Status: 1RI - In Progress Fiscal Year: 2011

Department*: ITI - ITI Organization: Contract

Location*: MIS - IT Contracts

Required By Date: Entered Date: 05/25/2011

Requisition Type: Type Code:

Requestor: Administrator System Purchaser:

Contact: Administrator System Contact Phone: 504 666 6666 -

Alternate ID: Tax Rate:

Estimated Cost: \$0.00

Print Format: *

Purchasing Requisition Number*: 1161250

Date Last Updated: 05/25/2011 11:17:25 AM User Last Updated: Administrator System

Enter the following **required** fields **only**:

- Short Description – Include a brief description of the contract (no more than 100 characters)
- Department – Defaults to your department, but can be changed if you have access to more than one department
- Location – Defaults to your location, but can be changed if you have access to more than one location
- PO Type – Select Blanket
- Requisition Number – Enter the Purchasing Module or AFIN requisition number. If there is no Requisition number because the Contract is a grant agreement or otherwise does not result in the expenditure of funds, type “N/A”.
- Proposed contract start and end date.


and select “Save & Continue.”

2. Then, click on the Items tab and click “Add Open Market Item”.

Exhibit 3A: Quick Reference Guide

Creating a Contract Request

Enter the following information about the contract. The following fields are required:

- **Description:** This should include sufficient descriptive information about the contract to allow for searching and reference by approvers. 3-4 sentences would be an appropriate length.
- **Quantity:** Enter the number of the item you wish to purchase. Example: if the contract is for a set number of hours of services, enter the hours. Or, you can enter “1” if the contract is for a lump sum. In general and if you are purchasing a service or bulk goods not easily broken down by quantity, enter “1” in the Quantity field and enter the total maximum contract amount in the Unit Cost field.
- **Unit Cost:** Enter the known or estimated unit cost (example: hourly rate or lump sum amount).
- **UOM:** Select the appropriate Unit of Measure from the list that corresponds to your Unit Cost. In general, use YR for maximum compensation. If the contract is multi-year, be sure to select TOTAL.
- **NIGP Class/NIGP Item:** Use the search icon () to look up the appropriate commodity code based on “keyword”. The NIGP Class/Item identifies what type of good or service you are contracting for and will be used for transparency and reporting by the City.

Click “Save & Exit” if you have entered all items, or “Save & Continue” to review what you entered for that item.

3. If necessary, you can go to the **Address** tab and change the “Ship To” and “Bill To” addresses as long as you have permission to do so; otherwise this information is automatically populated by BuySpeed.
4. Go to the **Vendors** tab to specify which vendor the contract is for. Click on “Lookup & Add Vendors”, which will give you a search screen to find your vendor using the vendor’s name, Tax ID, etc. Once found, select the vendor and click “Add Vendor.” This will close the search window and take you back to your requisition, adding the vendor data to the requisition.

YOU MUST ENSURE YOUR VENDORS, GRANTORS, GRANTEES, AND OTHERS ARE REGISTERED IN BUYSPEED. Please refer to Quick Reference Guide 0 “Vendor Registration in BuySpeed” to provide to your vendor or other contract party. It is your responsibility to notify your vendor or other contract party to register in BuySpeed prior to your routing the contract. Many vendors will already be registered in BuySpeed.

Exhibit 3A: Quick Reference Guide

Creating a Contract Request

Open Market Requisition 1161251 status: 1RU - In Progress

General Items **Vendors** Address Accounting Routing Attachments Notes Reminders Summary

Vendor Validation Warnings

- No recommended vendor.
- Item # 1: No vendor, and there is no recommended vendor at header level.

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Remit-to
<input type="text"/>				

☐ Publish Informal Bid On Web
☐ Show Unit Prices to Vendors
☐ Allow Vendor to Change Quantity
☐ Allow Vendor to Change UOM
 Select bidder participation
☐ Unrestricted Informal bid, all vendors can view and respond
☐ Restricted Informal bid, only selected vendors can view and respond

Informal Bid Date Section

Bid Ending Date (MM/DD/YYYY HH:MM:SS AM or PM)

Bid Available Date (MM/DD/YYYY HH:MM:SS AM or PM)

Purge Date (MM/DD/YYYY)

Lookup & Add Reference Vendors - Requisition 1161251

Search Using: ALL of the criteria Find It Clear

Search Fields:

Vendor ID	<input type="text"/>	Vendor Name	<input type="text" value="periscope"/>
Vendor Tax ID	<input type="text"/>	Vendor Legal Name	<input type="text"/>
Vendor Keyword	<input type="text"/>	Alternate ID	<input type="text"/>
ZIP Code	<input type="text"/>	County	<input type="text"/>
State	<input type="text"/>		
<input type="checkbox"/> Emergency Suppliers		<input type="checkbox"/> Reference Vendor	
NIGP Class	<input type="text"/>		
NIGP Class Item	<input type="text"/>		
NIGP Keyword	<input type="text"/>		
OWNERSHIP	<input type="text"/>		

5. Go to the **Attachments** tab and add attachments to your requisition. The following documents **ARE REQUIRED** for all electronic contract requests, and failure to attach any item **will** result in the requisition being returned to you.
 - Word Document of proposed contract (using the Law Department Template, if applicable) or proposed scope, special provisions, term and contract amount
 - DBE Forms
 - Procurement Documentation evidencing ALL selection materials demonstrating proper procurement:
 - RFP/RFQ/Invitation to Bid
 - Scoresheets/qualitative evaluation sheets/bid tabulations
 - Selected vendor's proposal/bid
 - Award letter
 - Tax Clearance Form
 - Felon Affidavit
 - Non-Solicitation Affidavit
 - Resolutions of the vendor authorizing the contract and the signatory
 - Evidence of Good Standing and Authorization to Do Business in LA
 - For amendments, PDFs of the original contract and any prior amendments

Exhibit 3A: Quick Reference Guide

Creating a Contract Request

The screenshot shows a 'Choose file' dialog box with the 'Contract Documents' folder selected. The file list includes: Bid Award Letter.doc, Bid Tabulation.doc, DBE Forms.doc, **Felony Affidavit.doc**, Invitation to Bid.doc, LA SOS Certification of Good Standing.doc, Non-Disclosure Forms.doc, Scope of Work Demolition Services.doc, and Tax Clearance Form.doc. The 'File name' field contains 'Felony Affidavit.doc' and the 'Files of type' is set to 'All Files (*.*)'. The background shows the 'Administrator System' interface with a search bar and a list of documents.

Name	Description	Show Vendor	Attached By	Attached Date	Delete
Scope of Work Demolition Services.doc		<input checked="" type="checkbox"/>	Administrator System	05/31/2011	<input type="checkbox"/>
DBE Forms.doc		<input checked="" type="checkbox"/>	Administrator System	05/31/2011	<input type="checkbox"/>
Invitation to Bid.doc		<input checked="" type="checkbox"/>	Administrator System	05/31/2011	<input type="checkbox"/>
Bid Tabulation.doc		<input checked="" type="checkbox"/>	Administrator System	05/31/2011	<input type="checkbox"/>
Bid Award Letter.doc		<input checked="" type="checkbox"/>	Administrator System	05/31/2011	<input type="checkbox"/>
Tax Clearance Form.doc		<input checked="" type="checkbox"/>	Administrator System	05/31/2011	<input type="checkbox"/>
Felony Affidavit.doc		<input checked="" type="checkbox"/>	Administrator System	05/31/2011	<input type="checkbox"/>
Non-Solicitation Affidavit.doc		<input checked="" type="checkbox"/>	Administrator System	05/31/2011	<input type="checkbox"/>

Once you have completed the above steps, select “Submit for Approval” on the **Summary** tab.

After submitting the Requisition, the approval path will be displayed for your information. Click “Continue” to push it through that approval path.

Once the final approval has been received, the requisition will be routed to the Law Department for processing as a Contract.

DOCUMENTS TO BE INCLUDED IN THE HARDCOPY CONTRACT PACKAGE

In general, Hardcopy Contract Packages are not required. If original documents are required by the Law Department, the Hardcopy Contract Package must be delivered to the Law Department the same day at the electronic contract submittal.

REJECTIONS

For the first phase of contract approval process – the Request for Contract – if any approver rejects the contracts, it will return to the Originating Department for changes and resubmittal.

Exhibit 3A: Quick Reference Guide

Creating a Contract Request

For the second phase of contract process – the Contract Document Creation and Execution – if any documentation is missing, in error, or incomplete, the Law Department will reject the electronic submission and it will be returned to the Originating Department for changes and resubmittal with no exceptions. If original documents have been submitted, it is the responsibility of the Originating Department to pick up the Hardcopy Contract Package from the Law Department and make the necessary changes to the Hardcopy Contract Package prior to electronic resubmittal.

If the Assigned Attorney has a question for the Originating Department during negotiations, the Assigned Attorney will submit an email request to the Originating Department with clear instructions and an expected due date. Failure to coordinate responses with the Assigned Attorney may result in contract rejection.

EXECUTED CONTRACTS

Two (2) original contracts will be executed in all cases, except construction contracts which will have an additional original contract for recordation for a total of three (3) original contracts. Departments and vendors will receive electronic mail notification that the Contract has been executed. The vendor can then pick up their original contract in the Law Department.

SPECIAL ROUTING INSTRUCTIONS

CONSTRUCTION CONTRACTS

Departments with construction contracts should bring the assigned attorney in early, before beginning the electronic routing process in order to ensure the contract language is correct and complete. Then the Originating Department should obtain the bonding agent signature, the vendor signature and then submit the package electronically and in hardcopy as usual. Originating Departments must also include three (3) original construction contracts instead of two (2) for the purpose of recordation.

SPECIAL CIRCUMSTANCES

The Originating Department may obtain the other contracting party's signature on two Contracts only under special circumstances. The Originating Department may obtain the signature for Cooperative Endeavor Agreements, any Contracts, and any grant agreement instrument that must by necessity be signed prior to submission to the City. In these special cases, the Originating Department must coordinate with their Assigned Attorney before beginning the electronic routing process in order to ensure the contract language is correct and complete.

OUT OF TOWN VENDORS

The Law Department will obtain signatures from out of town vendors. The Law Department will coordinate with departments to ensure they have the correct contact information and in case of urgent issues.

Exhibit 3B: Quick Reference Guide

Approving a Request for Contract or a Contract

This quick reference guide is designed to assist you in understanding how to Approve or Disapprove a Contract using BuySpeed's Electronic Contract Management System Module (ECMS). This process assumes that the Originating Department has already created a Request for a Contract using a BuySpeed Requisition.

Approval in BuySpeed Contracts Management module is the means by which identified approvers signify their approval or disapproval of a Request for Contract and a Contract. The ITI Contract Management Administrators establish who can approve, under what circumstances each person approves, and in what order.

When a Request for Contract or a Contract is submitted for approval, BuySpeed determines the users that must approve based on the criteria established by the City's current policy, and notifies each approver via email once it is their turn to approve a Request for Contract or a Contract. Additional approvers may also be added each time manually by the user submitting a Request for Contract or a Contract or by any of the approvers. For example, the Chief Administrative Officer could add the Chief Information Officer as an additional Approver to review Contracts involving technology.

Overview

You may be asked to approve one or both, the Request for Contract ("Requisition") and the Contract ("Purchase Order, Blanket/Contract"). In BuySpeed, some of the terminology for Contract routing resembles the procurement terminology. The table describes the BuySpeed terminology and what you'll be approving.

Contract Terminology	BuySpeed Terminology
Request for Contract	Requisition
Assign Contract to an Attorney	Convert to Purchase Order
Approve Contract	Approve Blanket/Contract
Assigned Attorney	Purchaser
Contract	Blanket Purchase Order

Once a Request for a Contract or a Contract is submitted for approval, it enters the "Ready for Approval" status. All packages in this status can be characterized as follows:

- Limited editing capability exists to ensure that the package is not materially changed during the approval process so that an approver isn't recorded as having approved a document with substantial changes they did not see.
- All triggered approvers must approve in the order specified by Contract Management Administrators before the document can be processed further. No approvers can be skipped.

If any approver disapproves, the package is returned to the Originating Department. If re-submitted for approval, it must travel down the entire approval path that is triggered upon re-submittal.

Exhibit 3B: Quick Reference Guide

Approving a Request for Contract or a Contract

Navigation

You will be notified via email when a Request for a Contract or a Contract requires your approval. The standard email message is displayed below. Note that the language that displays in the email is configurable by Contract Management Administrators from your agency. No reminder emails can be sent; it is your responsibility to log in to the Contracts Management program regularly to approve or disapprove Request for a Contracts or Contracts in your queue. Performance metrics on approval times are being monitored as part of the City's transformation efforts and Stat programs.

Before you can review and approve a Request for a Contract or a Contract, you must login to BuySpeed. To login to BuySpeed, input your user name into the "Login ID" field and the password you were given by an administrator into the **Password** field. Your user name is the letter "c" for Contracts plus your email address prefix. For example, Jane M. Smith's user name would be cjmsmith. Next, either click **Enter** on your keyboard or click the **Login** button. The login ID and password are not case sensitive. You will be asked to change your password the first time that you login.

City of New Orleans

Welcome To City of New Orleans

CITY OF NEW ORLEANS
Mitchell J. Landrieu, Mayor

Welcome to the City of New Orleans Purchasing portal page. This portal provides access to vendors to register as a vendor, check for new bid opportunities and login to the system. If you have any questions, please call Purchasing at 504-658-1550 or email Purchasing@cityofno.com.

- Register**
Register here to begin using City of New Orleans.
Vendors, please read this [disclaimer](#) prior to registering.
- Complete Registration**
Complete registration here to begin using City of New Orleans.
Vendors, please read this [disclaimer](#) prior to completing registration.
- Open Bids**
Browse open bid opportunities.

Login ID: buyspeed

Password:

Login

[Forgot your password?](#)

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Exhibit 3B: Quick Reference Guide

Approving a Request for Contract or a Contract

If you are a current user of BuySpeed for Purchasing or Accounts Payable, you will need to make sure you log in with your Contracts Management ID and Password

The quickest way to locate a Request for a Contract or a Contract requiring your approval is via the Approval tab on the Homepage. The **Documents Pending My Approval** section on this tab lists all of the Requests for a Contract or a Contract that have been submitted by other users that require your approval in order to proceed. Requests for a Contract or a Contract within this section are separated by type. Selecting the Request for a Contract or a Contract number link on the left side of the screen will open the package and allow you to review it. After your review you can decide whether to approve, disapprove or cancel the Request for a Contract or a Contract.

Home - Welcome Back Administrator System

News(2)Reqs(5)Bids(0)PO(0)Approval(4)My Reminders(0)Events(0)

My Documents Pending Approval

Requisition #	Requisition Date	Description	Approval Requested	Approver	Approval Status	Date Approved	
1161251	05/25/2011	Contract Request for Consulting Services	06/20/2011 09:04:53 PM	Allen Square	Approved	06/20/2011 09:07:27 PM	
			06/20/2011 09:05:47 PM	Administrator System	Waiting...		
			06/20/2011 09:04:53 PM	Andrew Kopplin	Waiting...		
			06/20/2011 09:04:53 PM	Joycelyn Christopher	Waiting...		
			06/20/2011 09:04:53 PM	Mary Kay Kleinpeter-Zamora	Waiting...		
			06/20/2011 09:04:53 PM	Nat Celestine	Waiting...		
			06/20/2011 09:04:53 PM	Norman Foster	Waiting...		
			06/20/2011 09:04:53 PM	Vanessa Honore	Waiting...		
			06/20/2011 09:04:53 PM	Lisa Hudson	Waiting...		
			06/20/2011 09:04:53 PM	Germaine Bartholomew	Waiting...		
1161218	05/24/2011	Software Maintenance and Support	06/20/2011 09:04:53 PM	Andrew Kopplin	Waiting...		
			06/20/2011 09:04:53 PM	Joycelyn Christopher	Waiting...		
			05/24/2011 11:51:32 AM	Allen Square	Approved		05/24/2011 12:12:44 PM
			05/24/2011 11:51:32 AM	Andrew Kopplin	Approved		
			05/24/2011 11:51:32 AM	Joycelyn Christopher	Approved		05/24/2011 12:15:12 PM
			05/24/2011 11:51:32 AM	Mary Kay Kleinpeter-Zamora	Approved		
			05/24/2011 11:51:33 AM	Nat Celestine	Approved		
			05/24/2011 11:51:33 AM	Norman Foster	Waiting...		
			05/24/2011 11:51:33 AM	Vanessa Honore	Waiting...		
			05/24/2011 11:51:33 AM	Lisa Hudson	Waiting...		
05/24/2011 11:51:33 AM	Germaine Bartholomew	Waiting...					
05/24/2011 11:51:33 AM	Andrew Kopplin	Waiting...					
05/24/2011 11:51:33 AM	Joycelyn Christopher	Waiting...					

Documents Pending My Approval

Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
1161251	05/25/2011	Contract Request for Consulting Services	11	Open Market	Administrator System	ITI / MIS	\$150,000.00

Reviewing a Document

Upon selecting any Request for a Contract or a Contract, the Summary tab of the Request for a Contract or a Contract will display. The Summary tab contains all of the information entered on the Request for a Contract or a Contract. The Summary tab of all Requests for a Contract or Contracts contains **Header Information** and **Item Information** sections. Depending on whether you are approving a Request for a Contract or a Contract, other sections may also appear on the Summary tab.

In order to view the scope of work, special terms, proposed length of contract, procurement documentation, and other required contract package documents, select the **Attachments** tab. You may download editable documents, make changes and upload new documents if needed; the Contracts Management module will keep records of all previous versions of all documents. On the bottom of the Summary tab, the approval options will appear, allowing you to approve, disapprove, or cancel the document.

Exhibit 3B: Quick Reference Guide

Approving a Request for Contract or a Contract

If you have a clarification question or need to request simple information from the Originating Department or other Approver, you may create a reminder email under the Reminders tab to send to any user. In addition, you may include a deadline for a response from that user.

Open Market Requisition 1161251 Status: 1RRA - Ready for Approval

General Items Vendors Address Accounting Routing Attachments(8) Notes Reminders **Summary**

Overall Validation Warnings

- Bid threshold of \$20,000.00 has been exceeded.
- Item # 1: No vendor, and there is no recommended vendor at header level.

Header Information

Requisition Number:	1161251	Short Description:	Contract Request for Consulting Services	Status:	1RRA - Ready for Approval
Organization:	Contract				
Department:	ITI - ITI	Location:	MIS - IT Contracts	Required By Date:	
Entered Date:	05/25/2011	Requisition Type:	Open Market	Type Code:	
Requestor:	Administrator System	Purchaser:		Fiscal Year:	2011
Contact:	Administrator System	Contact Phone:	(504)666-6666	Alternate ID:	
Estimated Cost:	\$150,000.00	Print Format:			
Ship-to Address:	Andrée Cohen Purchasing Bureau 1300 Perdido Street Room 4W07 New Orleans, LA 70112 US Email: test@periscopeholdings.com Phone: (504)658-1550	Bill-to Address:	City Of New Orleans Accounts Payable 1300 Perdido Street Suite 3W03 New Orleans, LA 70112 US Email: test@periscopeholdings.com Phone: (504)658-1527		

Purchasing Requisition Number: 1161250

Vendors:

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Recommended
00000001		Periscope Holdings Inc TEST	Email	No

Attachments: [Scope of Work Demolition Services.doc](#), [DBE Forms.doc](#), [Invitation to Bid.doc](#), [Bid Tabulation.doc](#), [Bid Award Letter.doc](#), [Tax Clearance Form.doc](#), [Felony Affidavit.doc](#), [Non-Solicitation Affidavit.doc](#)

Providing Approval

Once you've finished your review, you can view the approval path information for the Request for a Contract or a Contract on the bottom of the Summary tab where you conducted your review. The **Approval Path** section displays all of the approvers that must review and approve the Request for a Contract or a Contract for it to be processed forward and the order of approval. If other approvers were asked to approve before you and approved the Request for a Contract or a Contract, a date and time will appear in the **Date Approved/Disapproved** section in the row for that approver.

If you note that a person is not on the approval path that should review the Request for a Contract or a Contract, you can add them by selecting their name in the dropdown box in the **Approver** column, assigning them an **Order Sequence**, and clicking **Add/Delete Approver**. Note that you will only be able to add approvers to the end of the existing approval path. If you would like to remove an approver you've added, you can click the check box in the **Delete** column and select **Add/Delete Approver**.

Exhibit 3B: Quick Reference Guide

Approving a Request for Contract or a Contract

	Germaine Bartholomew	6	REQUEST	15	Alternative	06/20/2011 09:04:53 PM			
	Andrew Kopplin	7	REQUEST	20	Primary	06/20/2011 09:04:53 PM			
	Joycelyn Christopher	7	REQUEST	20	Alternative	06/20/2011 09:04:53 PM			
Add New	<input type="text"/>	<input type="text"/>			Primary				
<input type="button" value="Add/Delete Approver"/>									

Approval Actions

Options ☒ Approve ☐ Disapprove ☐ Cancel Requisition

Comment

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Once you are ready to provide a Request for a Contract or a Contract your approval decision, view the **Approval Actions** section below the **Approval Path** section on the Summary tab of the Request for a Contract or a Contract you are approving. If you choose to “Approve,” this will trigger a notification to the next approver. If you are the last approver, the Request for a Contract or Contract will change status in order to allow for further processing. The next user that can now process the Request for a Contract or a Contract will be notified. If you “Disapprove” a Request for Contract or Contract, you must note the reason in the “Comment” field. The Request will return to the Originating Department for resubmittal.

Approval Actions

Options ☒ Approve ☐ Disapprove ☐ Cancel Requisition

Comment

Exhibit 3C: Quick Reference Guide

Processing a Contract

This quick reference guide is designed to assist you in understanding how to process a Contract using BuySpeed's Electronic Contract Management System Module. This process assumes that the Originating Department has already created a Request for a Contract using a BuySpeed Requisition.

Key Terms and Process Overview

A contract request will be created using a **Requisition** document in the BuySpeed Contract Management module. This Requisition document will route for approval through originating department management and executive management (including Deputy Mayor/Deputy CAO, Purchasing, Finance, Civil Service, and CAO) before routing to the Law Department.

The Requisition will be turned into a **Contract** by creating a **Blanket Purchase Order** by the Law Department. The Law Department will then complete the Contract document, including negotiations with vendors, and submit for approval and Contract execution.

Once the Contract is executed by the Mayor, the Originating Department and the Vendor will be notified via email that the executed Contract is available through an electronic link and that one executed Original is available in the Law Department for the Vendor pick up. Once the contract is executed, it is the Originating Department's responsibility to email the electronic link to the executed Contract to the Bureau of Purchasing. The Bureau of Purchasing is responsible for issuing a **Purchase Order**.

Creating a Contract from a Requisition

1. Requests for Contracts assigned to the Law Department Contract Manager will be listed on the home page under the Requisitions > Ready for Purchasing tab. Click on the Requisition number of the package you want to convert to a Contract.

The screenshot shows the 'Administrator System' home page. At the top is a navigation bar with links: Home, Items, Documents, Vendors, Quick Buy, and a Find It search box. Below this is a summary bar with various status counts: News(2), Reqs(5), Bids(0), PO(0), Approval(3), My Reminders(0), Events(0), In Progress(2), Ready for Approval(2), Ready for Purchasing(1), Returned(0), and Gone to PO(0). The 'Ready for Purchasing(1)' tab is selected. Below the summary bar is a table with the following data:

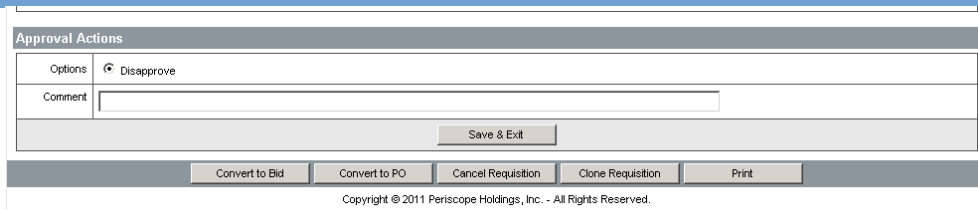
Requisition #	Requisition Date	Description	Type	Dept/Loc	Purchaser	Total
1161258	05/26/2011	Professional services contract for nursing services	Open Market	CAO/CAO	Terry Oels	\$25,000.00

At the bottom of the page, there is a copyright notice: Copyright © 2011 Periscope Holdings, Inc. - All Rights Reserved.

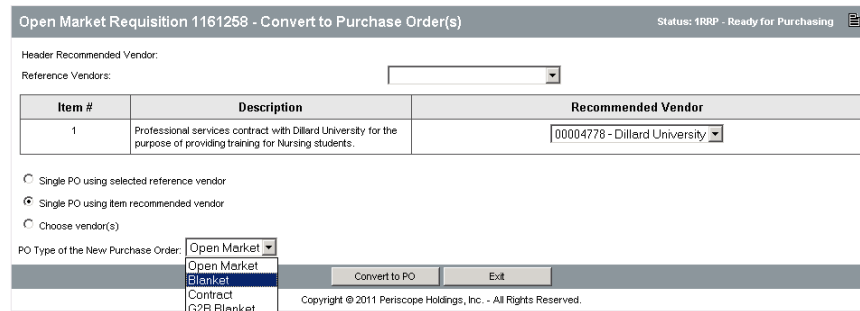
2. Review the summary tab of the Requisition. Go to the **Attachments** tab to check the attachments to the Requisition. For a list of all required attachments by Contract type refer to Policy Memorandum 122(R) Exhibit 1A-1F. The Law Department Contract Manager must immediately disapprove the Contract if required Attachments are not attached and accurate.
 - a. If the package is incomplete OR you do not receive any required original Hardcopy documents, enter the reason in the "Comment" field at the bottom of the summary tab, select "Disapprove" and click Save & Exit. This will return the Requisition to the originator, who will need to edit and resubmit for approval. NOTE that the Requisition will go back through all approvals if returned.
 - b. If the package is complete, click Convert to PO at the bottom of the summary tab.

Exhibit 3C: Quick Reference Guide

Processing a Contract

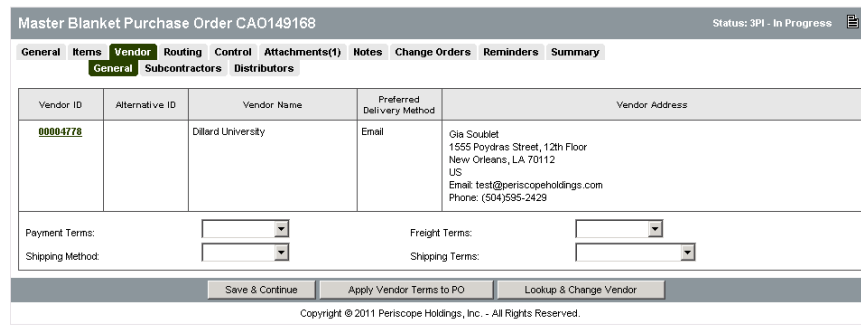


- c. A new screen will appear where you select the vendor you want to issue the Contract to. Select the vendor from the appropriate dropdown, and select “Blanket” as the type of PO. Then click “Convert to PO”.



3. The Vendor tab specifies the **General (prime) contractor, any subcontractors, and vendor distributors** for the Contract.

- Click on the **Vendor Tab**. The vendor awarded the Blanket/Contract will display. Here you can choose the terms for orders placed against this contract.



- Click on the **Distributor** sub-tab to add vendors that are authorized to act as distributors or subcontractors. Use the following steps to locate vendors and add them to this tab, if necessary.
 - Click on **Lookup & Add Vendor** to search for a vendor.
 - Select search criteria and **Find It** to display the available vendors.
 - Choose a vendor by clicking on the radio button in the **Select** column.

Exhibit 3C: Quick Reference Guide

Processing a Contract

Master Blanket Purchase Order CAO149168 Status: SPI - In Progress

General Items **Vendor** Routing Control Attachments(1) Notes Change Orders Reminders Summary

General Subcontractors **Distributors**

Vendor Distributor List

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Distributor Status	Delete
<input type="text"/>					<input type="checkbox"/>
00004778		Dillard University	Email	Active <input type="button" value="v"/>	<input type="checkbox"/>

☒ Include Primary Vendor in the Vendor Distributor List

i Please save your changes before looking up and adding vendor distributors, sorting table. Otherwise, your changes will be lost.

Save & Continue Reset Lookup & Add Vendor Distributors

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NOTE: Vendors added here can be communicated on orders placed through the system. If only the prime vendor is to be sent orders, then select the checkbox labeled “Include Primary Vendor in the Vendor Distributor List” and select **Save & Continue**.

4. The Control tab specifies the contract term (period) and who can use the contract. The following guidelines should be followed:
 - **Master Blanket/Contract Begin Date:** Date on which contract is active and usable
 - **Master Blanket/Contract End Date:** Date on which contract is no longer active and usable
 - **Cooperative Purchasing Allowed:** Should be selected for multi-agency or statewide contracts
 - **Organization:** Specify which agencies can order from contract. Select “ALL ORG – Organization Umbrella Master Control” for City-wide.
 - **Department:** Specify which departments within the selected agencies can use contract. Select “AGY – Agency Umbrella Master Control” for all departments.
 - If appropriate, you can enter a dollar limit for the contract/organization/department or a minimum use amount

Master Blanket Purchase Order CAO149168 Status: SPI - In Progress

General Items Vendor Routing **Control** Attachments(1) Notes Change Orders Reminders Summary

Master Blanket/Contract Begin Date*: 05/01/2011 Master Blanket/Contract End Date*: 04/30/2012

Cooperative Purchasing Allowed ☐

Organization	Department	Dollar Limit	Dollars Spent to Date	Minimum Order Amount	Delete
KONT - Contract	HEALTH - HEALTH	25000.00	\$0.00	0.00	<input type="checkbox"/>
KONT - Contract	Add New: <input type="text"/>	0.0	\$0.00	0.0	

i Dollar Limit set to 0 indicates no limit.

Save & Continue Reset

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Click **Save & Continue** when complete.

5. The Contract Manager assigns the contract to an attorney by selecting that attorney’s name from the Purchaser dropdown on the General tab. The contract will then display on that attorney’s Home Page under “POs In Progress”.

General Items Vendor Address Accounting Routing Attachments(1)

PO Number: 2133150372

Short Description*: catering service

Purchaser: System, Administrator

Exhibit 3C: Quick Reference Guide

Processing a Contract

6. Assigned Attorney can go to the **Attachments** tab to check and add attachments to the Contract. For a list of all required attachments by Contract type refer to Policy Memorandum 122(R) Exhibit 1A-1F. The Assigned Attorney must immediately disapprove the Contract if required Attachments are not attached and accurate.

The top screenshot shows a 'Choose file' dialog box in Microsoft Internet Explorer. The 'Look in' dropdown is set to 'Contract Documents'. The file list includes: Bid Award Letter.doc, Bid Tabulation.doc, DBE Forms.doc, Felony Affidavit.doc, Invitation to Bid.doc, LA SOS Certification of Good Standing.doc (highlighted), Non-Disclosure Forms.doc, Non-Solicitation Affidavit.doc, Scope of Work Demolition Services.doc, and Tax Clearance Form.doc. The 'File name' field contains 'LA SOS Certification of Good Standing.doc' and the 'Files of type' dropdown is set to 'All Files (*.*)'. The bottom screenshot shows the 'Attachments' tab in the 'Administrator System'. The 'Master Blanket Purchase Order CA0149168' is displayed with a status of '3PI - In Progress'. The 'Attachments' tab shows a table of attachments:

Name	Description	Show Vendor	Attached By	Attached Date	Delete
Scope of Work Demolition Services-1.doc		<input checked="" type="checkbox"/>	Administrator System	06/01/2011	<input type="checkbox"/>
DBE Forms-1.doc		<input checked="" type="checkbox"/>	Administrator System	06/01/2011	<input type="checkbox"/>
Invitation to Bid-1.doc		<input checked="" type="checkbox"/>	Administrator System	06/01/2011	<input type="checkbox"/>
Bid Tabulation-1.doc		<input checked="" type="checkbox"/>	Administrator System	06/01/2011	<input type="checkbox"/>
Bid Award Letter-1.doc		<input checked="" type="checkbox"/>	Administrator System	06/01/2011	<input type="checkbox"/>
Tax Clearance Form-1.doc		<input checked="" type="checkbox"/>	Administrator System	06/01/2011	<input type="checkbox"/>
Felony Affidavit-1.doc		<input checked="" type="checkbox"/>	Administrator System	06/01/2011	<input type="checkbox"/>
Non-Solicitation Affidavit-1.doc		<input checked="" type="checkbox"/>	Administrator System	06/01/2011	<input type="checkbox"/>
LA SOS Certification of Good Standing.doc		<input checked="" type="checkbox"/>	Administrator System	06/01/2011	<input type="checkbox"/>

Buttons at the bottom: Save & Continue, Add Attachment.

Once you have completed the above steps, select “Submit for Approval” on the **Summary** tab.

After submitting the Contract, if an applicable approval path is found, it will be displayed for your information. Click “Continue” to push it through that approval path.

Exhibit 3C: Quick Reference Guide Processing a Contract

Master Blanket Purchase Order CAO149168 Status: 3PI - In Progress

The following 2 approval paths meet the document criteria.

Approval Path	Path Type	Path Priority Sequence	Description	Dollar Range	Approvers		
					User	Level	Type
CONTRACT	Executive Review	20	Contract Approval	\$0.00-\$999,999,999,999.99	Robert Rivers	5	Primary
					Erica Beck	5	Alternate
					Nanette Jolivet-Brown	10	Primary
					Robert Rivers	10	Alternate
					Andrew Kopplin	15	Primary
					Joycelyn Christopher	15	Alternate
					Richard Cortizas	20	Primary
					Suzie Sepcich	20	Alternate
					Suzie Sepcich	25	Primary

Please click Continue to continue submitting the document, or click Cancel & Exit to cancel the document submission and go back to the document.

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REJECTIONS

For the first phase of Contract approval process – the Request for Contract – if any approver rejects the Contract, it will return to the Originating Department for changes and resubmittal. It is the responsibility of the Originating Department to pick up the Hardcopy Contract Package from the law department and make the necessary changes to the Hardcopy Contract Package prior to electronic resubmittal.

For the second phase of Contract approval process – the Contract Document Creation and Execution – if any documentation is missing, in error, or incomplete, the Law Department will reject the contract package and it will return to the Originating Department for changes and resubmittal, no exceptions. It is the responsibility of the Originating Department to pick up the Hardcopy Contract Package from the Law Department and make the necessary changes to the Hardcopy Contract Package prior to electronic resubmittal.

If the Assigned Attorney has a question for the Originating Department during negotiations, the Assigned Attorney will submit an email request to the Originating Department with clear instructions and an expected due date. Failure to coordinate responses with the Assigned Attorney may result in Contract rejection.

EXECUTED CONTRACTS

Two (2) original Contracts will be executed in all cases, except construction Contracts which will have an additional original Contract for recordation for a total of three (3) original Contracts. Departments and vendors will receive electronic mail notification that the Contract has been executed and the Purchase Order has been issued. The vendor can then pick up their original Contract in the Law Department, and the purchase order is accessible via the City's vendor purchasing portal.

SPECIAL ROUTING INSTRUCTIONS

CONSTRUCTION CONTRACTS Departments with construction Contracts should bring the assigned attorney in early, before beginning the electronic routing process in order to ensure the contract language is correct and complete. Then the Originating Department should obtain the bonding agent signature, the vendor signature and then submit the package electronically and in Hardcopy as usual. Originating Departments must also include three (3) original construction Contracts instead of two (2) for the purpose of recordation.

Exhibit 3C: Quick Reference Guide

Processing a Contract

SPECIAL CIRCUMSTANCES

The Originating Department may obtain the other Contracting party's signature on two Contracts only under special circumstances. The Originating Department may obtain the signature for Cooperative Endeavor Agreements, any Contracts, and any grant agreement instrument that must by necessity be signed prior to submission to the City. In these special cases, the Originating Department must coordinate with their Assigned Attorney before beginning the electronic routing process in order to ensure the contract language is correct and complete.

RECORDATION

The Originating Department must pick up the executed Contract from the Law Department upon email notification that the Contract has been executed. Originating Departments are responsible, with assistance from Law if necessary, for recordation of the Contract.

OUT OF TOWN VENDORS

The Law Department will obtain signatures from out of town vendors. The Law Department will coordinate with departments to ensure they have the correct contact information and in case of urgent issues.

Exhibit 3D: Quick Reference Guide

Searching for a Contract

This quick reference guide is designed to assist you in understanding how to search for a Contract using BuySpeed's Electronic Contract Management System Module. This process assumes that the Originating Department has already created a record for the contract by requesting for a contract using ECMS and the contract is either routing for approval or has been approved.

Key Terms and Process Overview

A Request for a Contract will be created using a **Requisition** document in the BuySpeed Contract Management module. This Requisition document will route for approval through originating department management and executive management (including Deputy Mayor/Deputy CAO, Purchasing, Finance, Civil Service, and CAO) before routing to the Law Department.

The Requisition will be turned into a **Contract** by creating a **Blanket Purchase Order** by the Law Department. The Law Department will then complete the Contract document, including negotiations with vendors, and submit for approval and Contract execution.

Once the Contract is executed, the vendor and Contract requestor from the Originating Department will receive an email with a link to the Contract, and the vendor will be able to pick up the executed Contract from the Law Department.

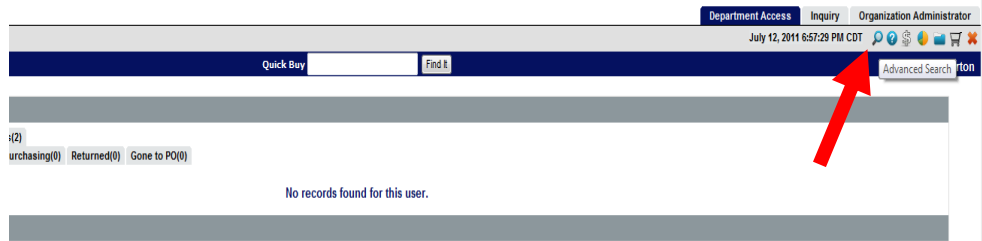
In BuySpeed, some of the terminology for Contract routing is misleading. The table describes the BuySpeed terminology and what you will be approving.

Contract Terminology	BuySpeed Terminology
Request for Contract	Requisition
Assign Contract to an Attorney	Convert to Purchase Order
Approve Contract	Approve Blanket/Contract
Assigned Attorney	Purchaser
Contract	Blanket Purchase Order

Searching for a Contract

In order to search for a Contract currently routing for approval or a Contract that has been approved and executed, click on the magnifying glass icon on your Home screen

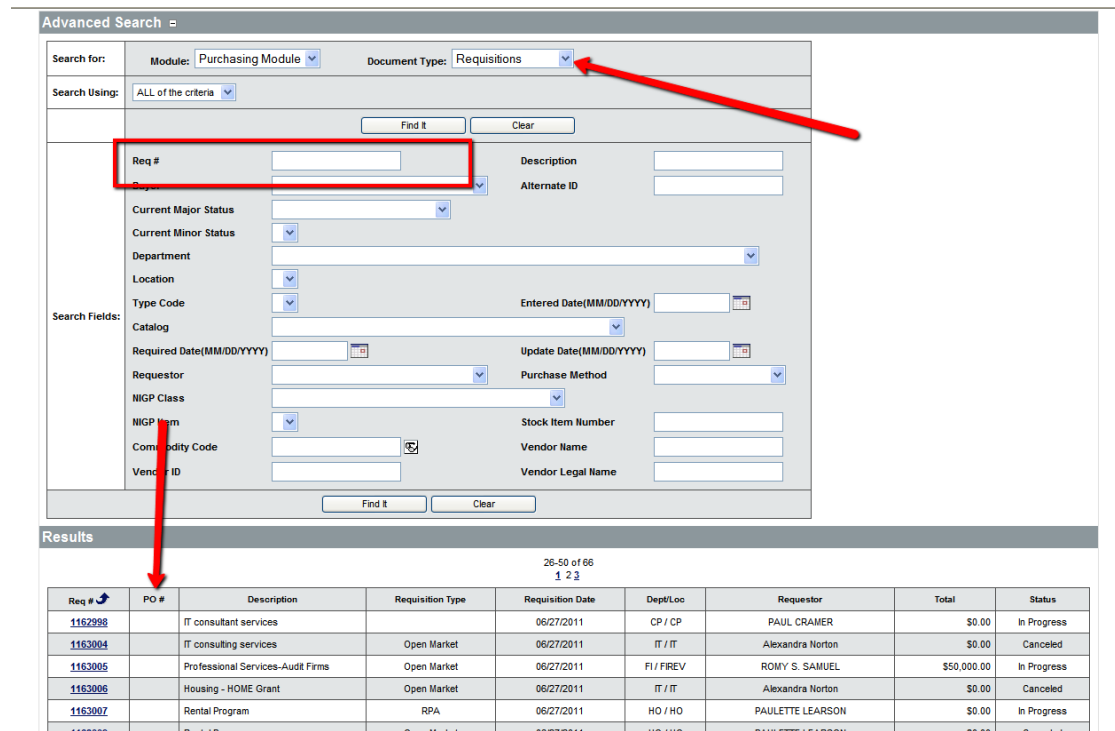
Exhibit 3D: Quick Reference Guide Searching for a Contract



Department Access Inquiry Organization Administrator
July 12, 2011 6:57:29 PM CDT
Quick Buy Find It
Advanced Search

urchasing(0) Returned(0) Gone to PO(0)
No records found for this user.

This will open the Advanced Search screen. On the Advanced Search screen, search for the Request for Contract or Contract using the **Contract Requisition Number** (do not use the Buyspeed Purchasing Module Requisition Number). If the Request for Contract has already been reviewed by the Law Department and converted to a Contract (also referred to as a PO in the BuySpeed System), that PO number will display in the results. You can click on the contract Requisition Number or the PO Number link to view the contract.



Advanced Search

Search for: Module: Purchasing Module Document Type: Requisitions
Search Using: ALL of the criteria
Find It Clear

Req #
Description
Alternate ID

Current Major Status
Current Minor Status
Department
Location
Type Code
Catalog
Required Date(MM/DD/YYYY)
Requestor
NIGP Class
NIGP Item
Commodity Code
Vendor ID

Entered Date(MM/DD/YYYY)
Update Date(MM/DD/YYYY)
Purchase Method
Stock Item Number
Vendor Name
Vendor Legal Name

Find It Clear

Results

26-50 of 66
1 2 3

Req #	PO #	Description	Requisition Type	Requisition Date	Dept/Loc	Requestor	Total	Status
1162998		IT consultant services		06/27/2011	CP / CP	PAUL CRAMER	\$0.00	In Progress
1163004		IT consulting services	Open Market	06/27/2011	IT / IT	Alexandra Norton	\$0.00	Canceled
1163005		Professional Services-Audit Firms	Open Market	06/27/2011	FI / FIREV	ROMY S. SAMUEL	\$50,000.00	In Progress
1163006		Housing - HOME Grant	Open Market	06/27/2011	IT / IT	Alexandra Norton	\$0.00	Canceled
1163007		Rental Program	RPA	06/27/2011	HO / HO	PAULETTE LEARSON	\$0.00	In Progress
1163008		Rental Program	Open Market	06/27/2011	HO / HO	PAULETTE LEARSON	\$0.00	Canceled

Exhibit 3D: Quick Reference Guide

Searching for a Contract

The following table will be useful to understand where your contract is in the approval process by using the information provided in the electronic system.

Approval Status	Contract Location in ECMS
"Ready for Approval" <ul style="list-style-type: none">Assigned a Requisition NumberPO Number not assignedFirst phase of approvers listed on the Requisition Summary Tab	Contract is currently in the Request for Contract approval stage. Once the Deputy Mayor, Purchasing, Finance, Civil Service, and the CAO approve the request, it will move to the next stage.
"Ready for Purchasing" <ul style="list-style-type: none">Assigned a Requisition NumberPO Number not assigned	The Request for Contract is awaiting the Law Department Contract Manager's review of the required attachments. The Request for Contracts has received approvals from the Deputy Mayor, Purchasing, Finance, Civil Service, and the CAO. The next stage is the Contract Manager review of all required attachments and acceptance into the Law Department.
"Gone to PO" <ul style="list-style-type: none">Assigned a PO NumberSecond phase of approvers <u>not</u> listed on the PO Summary Tab	The Law Department Contract Manager has reviewed the request and determined that all required attachments were included and acceptable, and the Contract is currently with the assigned attorney for review and negotiation. The next stage is approval by the Deputy City Attorney, CAO second review, vendor signature, City Attorney signature, Executive Counsel review, Mayor signature, and notification to the vendor and originating department.
"Gone to PO" <ul style="list-style-type: none">Assigned a PO NumberSecond phase of approvers is listed on the PO Summary Tab	The Contract has entered the second stage of approvals, which includes electronic tracking of each of the following steps: approval by the Deputy City Attorney, CAO second review, vendor signature, City Attorney signature, Executive Counsel review, Mayor signature, scan and upload of the original executed contract, and notification to the vendor and originating department that the contract has been executed and is available for vendor pick up.

Exhibit 3D.1: Quick Reference Guide

Searching for an Executed Contract

Once a contract is executed, you will receive an email from the Mayor's office. The Contract "PO number" number is listed in the subject line. A sample of the email is displayed below.

From: EMAIL ADDRESS
Sent: Tuesday, January 10, 2012 4:12 PM
Subject: Master Blanket Purchase Order **MO156128** Contract Approved

Contract has been executed, forward this email to your Bureau of Purchasing buyer in order to request a Purchase Order to be issued. A Purchase Order must be issued prior to authorizing work.

Use this link to log on to City of New Orleans: <http://www.purchasing.cityofno.com/bsa/login.jsp>

In order to view and download the signed Contract, simply click on the link in the email or visit www.purchasing.cityofno.com and log into your account. Go to **Advanced Search**, select **"Purchase Order"** as the **Document Type** and copy and paste or type the Contract "PO" number into the field labeled **PO#** and click **Find It**.

The graphic below details how to find an executed Contract once using the PO number from the notification email.

The screenshot displays the 'Advanced Search' interface of the City of New Orleans Purchasing Module. The interface includes a navigation bar at the top with links for 'Department Access', 'Inquiry', and 'Organization Administrator'. Below this is a search bar with 'Quick Buy' and 'Find It' buttons. The main search area is titled 'Advanced Search' and contains several sections:

- Search for:** A dropdown menu set to 'Module: Purchasing Module' and another dropdown set to 'Document Type: Purchase Orders'. A red arrow points to the 'Document Type' dropdown.
- Search Using:** A dropdown menu set to 'ALL of the criteria'.
- Find It** and **Clear** buttons.
- Search Fields:** A list of fields including PO #, PO Description, PO Type, Requestor, Header Major Status, Header Minor Status, Department, Location, Type Code, Catalog, Required Date (MM/DD/YYYY), Vendor ID, Fiscal Year, Organization, NIGP Class, NIGP Item, Commodity Code, Release Number, Alternate ID, Buyer, PO Date (MM/DD/YYYY), Update Date (MM/DD/YYYY), Vendor Name, Vendor Legal Name, Item Description, and Stock Item Number. The 'PO #' field is highlighted with a red box, and a red arrow points to it.
- Find It** and **Clear** buttons at the bottom of the search fields.

A red arrow points to the 'Find It' button at the bottom of the search fields. The interface also shows a status bar at the bottom with 'Local intranet | Protected Mode: Off' and a zoom level of 100%.

The Law Department Contract Manager will contact the vendor to pick up the contract. The department will not receive a hardcopy of the original contract unless requested. See Quick Reference Guide 5 for instructions on how to submit special instructions or request additional original contracts.

Exhibit 3E: Quick Reference Guide

Vendor Registration in BuySpeed

In order to receive notifications about Bid opportunities, notification that your Contract, CEA, or Lease has been executed, or to be issued Purchase Orders (POs) from the City of New Orleans, vendors, grantors, and grantees must be registered within the City's BuySpeed system. Vendors can register themselves by accessing the BuySpeed Online login screen at <http://www.purchasing.cityofno.com/bsol/login.jsp> and selecting **Register**.

Providing General Information

Upon clicking **Register**, a pop-up window will appear asking you to provide your entity's tax identification number (including a selection to indicate whether it is an SSN or EIN) and name, as well as the country in which your business is based and an email address where you can receive important information about your account.

BuySpeed will confirm that your tax ID does not already exist in the system. If your tax ID is already registered, you will be notified that you cannot complete registration.

If BuySpeed indicates that your tax ID is already in use, your business may also be registered. If you are registering on behalf of an organization that is affiliated with a vendor that is already registered and shares the same tax ID (for example, a DBA or Affiliate), please contact that entity to add you as an Associated Organization.

NOTE: If you are certain your entity has not registered and you believe this message to be an error, please contact the Vendor Administrator at the organization you are doing business with.

If your tax ID is new to the system, a **Register** screen will appear with a series of tabs to be completed sequentially from left to right. After completing each tab, you will be able to return to previous tabs in order to edit what you have entered.

Within the **Company Information** tab, supply your company's official address and contact information. ***If the Company Name that you market your services under differs from the legal name of your business, ensure that your official name is correct in the Vendor Legal Name field.*** By default, this field will include the **Company Name** you entered at the beginning of the registration process. An asterisk (*) indicates required fields, and you will not be allowed to proceed if required fields are blank or contain errors. When you have completed all information on the Company Information tab, select the button at the bottom of your screen that says, **Save & Continue Registration**.

Register - The Name You Market Your Services Under - ejacobsen@periscopeholdings.com

Company Information | Administrator | Address | Terms | Categories & Certifications | Commodity/Service Codes | Summary

Company Name*: The Name You Market Your Services Under Vendor Legal Name*: Your Official Name On Your Tax Certificate, Inc. Vendor - please be sure the name in this field is your legal name as it appears on your tax certificate to prevent penalties by the IRS.

Business Description:

Mailing Address Line 1*: 1600 Pennsylvania Avenue NW

Address Line 2:

Address Line 3:

Address Line 4:

Country*: US - United States of America

City*: Washington

State/Province*: DC

Zip*: 20500

County:

Company Phone*: 555 555 5555

Company FAX:

Company Email*: ejacobsen@periscopeholdings.com

Tax ID #: 111334444

Is Tax ID # an Employer Identification Number (EIN) or a Social Security Number (SSN)? ☒ EIN ☐ SSN

State of Incorporation: DE

Year of Incorporation: 3

Preferred Delivery Method: Email

Would you like to be registered as an emergency supplier in the case of an emergency? ☐ Yes ☒ No
Note: Emergency suppliers must be available 24 hours a day, 7 days a week.

Emergency Phone:

Emergency Contact:

Emergency Email:

Emergency Info Comment:

Save & Continue Registration | Reset | Cancel

Your Pre-Registration Notification Email

After completing the **Company Information** tab, you will receive an email providing your vendor number and contact information for the City. This email may take a few minutes to arrive. This email will provide information needed for the Help Desk to support you if for some reason you are unable to complete your registration at this time.

Entering Your Seller Administrator Information

You will now be taken to the **Administrator** tab, and will need to provide the information for an administrative user from your entity. This user will be responsible for adding new users from your entity to allow them access to BuySpeed Online. Please make note of the **Login ID** and **Password** used to create your account, as you will need this to access the system going forward. Once you have completed this information, select the **Save & Continue Registration** button at the bottom of your screen.

Register - The Name You Market Your Services Under - ejacobsen@periscopeholdings.com

Company Information **Administrator** Address Terms Categories & Certifications Commodity/Service Codes Summary

Administrative User Information

Salutation:	Mr. ▼		
First Name*:	John	Last Name*:	Smith
Job Title*:	Vice President of Marketing	Department:	
Email*:	ejacobsen@periscopeholdings.com	Phone*:	444
Login ID*:	ejacobsen		
New Password*:		Confirm Password*:	
Login Question:	What is your dog's name?	Login Answer:	Rosco

Save & Continue Registration Reset Cancel

Entering Your Addresses

Once the **Administrator** tab is complete, you will be taken to the Address tab. You will be required to enter at least one address, to be used as your general mailing address. After you have done so, you may select to **Save and Add Another** address and will be required to select an Address Type for each (Remit-to, PO, Bid, etc.). When you create each address, you can also check a box if that address should be used as the default for that address type. Please be sure to add and update all addresses needed for the City to send documents and payments to in BuySpeed Online using this section. After you have finished entering addresses, select **Save & Continue Registration**.

Exhibit 3E: Quick Reference Guide

Address Book - The Name You Market Your Services Under

Enter a New Address

Address Type: General Mailing Address

Name this Address*: General

Contact Name*: John Smith

Address Line 1*: 1600 Pennsylvania Avenue NW

Address Line 2:

Address Line 3:

Address Line 4:

Country*: US - United States of America

City*: Washington State/Province*: DC

ZIP*: 20500 County:

Phone*: 555 555 5555 Ext:

Toll Free: Mobile:

Fax: Email*: ejacobsen@periscopeholdings.com

Status: Active

☒ Default address for this address type

Add and maintain all of your addressess here

Save & Add Another Save & Continue Registration

Selecting Your Terms

Once you have selected to continue the registration process, you'll be taken to the **Terms tab**. Here you are asked to provide your standard payment and shipping terms.

After you've completed this screen, click **Save & Continue Registration** along the bottom.

Selecting Your Categories and Certifications

You will now be taken to a **Categories and Certifications** tab, where you will designate your status for various categories and certifications requested by the City. Specifically, enter the following information for your company:

- **OWNERSHIP** – Type of business ownership. This Category is required, so you must select one from the list.
- **DISADVANTAGED BUSINESS ENTERPRISE** – Are you a certified DBE? If so, you are responsible for ensuring that certifications selected are accurate, as your registration will not be considered complete without them.
- **OPTIONAL INFORMATION TO BE USED FOR STATISTICAL RECORD KEEPING ONLY** – The City requests that you provide demographic data to assist with statistical analysis. These fields are optional.

Once all required fields are completed, you may select the **Save & Continue Registration** button.

Registering for Commodity Codes

The last step in the registration process is to select the commodities and services that your entity provides. This will help ensure that you receive notifications about Bid opportunities for those commodities and services.

The **Commodity and Service Codes** screen allows you to search for the National Institute of Governmental Purchasing (NIGP) Codes that correspond with what your entity offers. You can peruse through general categories of commodities and services, or search by keyword. You can save your selections and browse for / add more commodity codes by selecting the codes you want to register for and selecting the **Save and Add Additional Codes** button. Once you've selected all the codes that match what you provide, select **Save and Continue Registration**.

Commodity and Service Codes - Testing Labs

Search

NIGP Class

NIGP Class Item

NIGP Keyword

Search using

ALL of the criteria

Search

1

Use the NIGP Commodity Code Search Engine if you are familiar with the NIGP code. If not use the NIGP Code Browse below.

NIGP Code Browse

1

Select the category that best describes the product and service you offer. Click on the question mark for more information.

01	Administrative, Financial, and Management Services
02	Agricultural Equipment and Related Products and Services
03	Arts, Crafts, Entertainment, Theatre
04	Automotive Products, Vehicles, and Services
05	Building Equipment, Supplies, and Services
06	Clothing, Textiles, Laundry Equipment, and Supplies
07	Communication Equipment and Services
08	Computers, Software, Supplies, and Services
09	Food, Equipment, and Related Services
10	Furnishings and Related Services
11	Furniture and Related Services
12	Hardware, Related Equipment, and Services
13	Highway Road Equipment, Materials, and Related Equipment
14	Janitorial and Cleaning Equipment, Supplies, and Services
15	Laboratory Equipment, Supplies, and Services
16	Maintenance and Repair of Equipment
17	Medical Equipment, Supplies, and Services
18	Miscellaneous Commodities and Services
19	Office Supplies, Related Items, and Services
20	Paper, Printing Equipment, and Related Products and Services
21	Personal Products, Equipment, and Services
22	Public Works, Park Equipment, and Construction Services
23	Rental and Leasing Services
24	Safety and Protection Equipment and Related Services
25	School and Library Equipment, Supplies, and Services
26	Sporting, Athletic, and other Outdoor Equipment and Services
27	Testing and Sampling Equipment and Services
28	The Trades: Electrical, Engineering, HVAC, Plumbing, and Welding
29	Transit Equipment and Related Services, Mass
30	Water and Sewer Treatment Equipment, Supplies, and Services

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Registering Your Commodity Codes

Reviewing Your Registration Summary and Finalizing Registration

You have now completed the self-registration process in BuySpeed Online. The email provided within the **Company Information** section will be emailed with a confirmation once your registration is complete.